



**Indiana Pro Bono Commission**  
230 East Ohio Street, Suite 200  
Indianapolis, IN 46204

**Indiana Bar Foundation**  
230 East Ohio Street, Suite 200  
Indianapolis, IN 46204

## **COMBINED 2003 DISTRICT REPORT, 2005 PRO BONO GRANT APPLICATION, AND 2005 PLAN**

**Pro Bono District 8**

**Applicant: Heartland Pro Bono Council, Inc.**

**Mailing Address:** 151 N. Delaware, Suite 1800

**City:** Indianapolis, IN **Zip:** 46204

**Phone:** 317-614-5304 **Fax:** 317-631-9775

**E-mail address:** [Laurie.Boyd@ilsa.net](mailto:Laurie.Boyd@ilsa.net) **Website address:** \_\_\_\_\_

**Judicial Appointee:** Hon. William J. Hughes

**Plan Administrator:** Laurie Beltz Boyd

**Names of Counties served:** Boone, Hamilton Hancock, Hendricks, Johnson, Marion, Morgan and Shelby

**Number of registered attorneys in county:** See attached **in district:** 6,269

**Percentage of volunteer attorneys *who accepted a pro bono case in 2003* per registered attorneys in county:** *See attached* **in district:** 24% reported to Heartland

**Percentage of volunteer attorneys *who have not yet accepted a pro bono case in 2003* per registered attorneys in county:** *see attached* **in district:** 15%

**Amount of grant received for 2004:** \$76,340

**Amount of grant (2003 & prior years) projected to be unused as of 12/31/04:** -0-

**Amount requested for 2005:** \$88,225

**The following representations**, made to the best of our knowledge and belief, are being provided to the Indiana Pro Bono Commission and Indiana Bar Foundation in anticipation of their review and evaluation of our funding request and our commitment and value to our Pro Bono District.

**Operation under Rule 6.5**

In submitting this application for funding, this district is representing itself as having a Pro Bono Plan, which is pursuant to Rule 6.5 of the Indiana Rules of Professional Conduct. The plan enables attorneys in our district to discharge their professional responsibilities to provide civil legal pro bono services; improves the overall delivery of civil legal services to persons of limited means by facilitating the integration and coordination of services provided by pro bono organizations and other legal assistance organizations in our district; and ensures access to high quality and timely pro bono civil legal services for persons of limited means by (1) fostering the development of new civil legal pro bono programs where needed and (2) supporting and improving the quality of existing civil legal pro bono programs. The plan also fosters the growth of a public service culture within the our district which values civil legal pro bono publico service and promotes the ongoing development of financial and other resources for civil legal pro bono organizations.

We have adhered to Rule 6.5 (f) by having a district pro bono committee composed of:

- A. the judge designated by the Supreme Court to preside;
- B. to the extent feasible, one or more representatives from each voluntary bar association in the district, one representative from each pro bono and legal assistance provider in the district, and one representative from each law school in the district; and
- C. at least two (2) community-at-large representatives, one of whom shall be a present or past recipient of pro bono publico legal services.

We have determined the governance of our district pro bono committee as well as the terms of service of our members. Replacement and succession members are appointed by the judge designated by the Supreme Court.

Pursuant to Rule 6.5 (g) to ensure an active and effective district pro bono program, we:

- A. prepare in written form, on an annual basis, a district pro bono plan, including any county sub-plans if appropriate, after evaluating the needs of the district and making a determination of presently available pro bono services;
- B. select and employ a plan administrator to provide the necessary coordination and administrative support for the district pro bono committee;
- C. implement the district pro bono plan and monitor its results;
- D. submit an annual report to the Commission; and

- E. forward to the Pro Bono Commission for review and consideration any requests which were presented as formal proposals to be included in the district plan but were rejected by the district committee, provided the group asks for review by the Pro Bono Commission.

### **Commitment to Pro Bono Program Excellence**

We also understand that ultimately the measure of success for a civil legal services program, whether a staffed or volunteer attorney program, is the outcomes achieved for clients, and the relationship of these outcomes to clients' most critical legal needs. We agree to strive for the following hallmarks which are characteristics enhancing a pro bono program's ability to succeed in providing effective services addressing clients' critical needs.

1. **Participation by the local bar associations and attorneys.** The associations and attorneys believe the program is necessary and beneficial.
2. **Centrality of client needs.** The mission of the program is to provide high quality free civil legal services to low-income persons through volunteer attorneys. Client needs drive the program, balanced by the nature and quantity of resources available.
3. **Program priorities.** The program engages in a priority-setting process, which determines what types of problems the program will address. Resources are allocated to matters of greatest impact on the client and are susceptible to civil legal resolution. The program calls on civil legal providers and other programs serving low-income people to assist in this process.
4. **Direct representation component.** The core of the program is direct representation in which volunteer attorneys engage in advocacy on behalf of low-income persons. Adjunct programs such as advice clinics, pro se clinics and paralegal assistance are dictated by client needs and support the core program.
5. **Coordination with state and local civil legal providers and bar associations.** The programs work cooperatively with the local civil legal providers. The partnerships between the civil legal providers and the local bar association results in a variety of benefits including sharing of expertise, coordination of services, and creative solutions to problems faced by the client community.
6. **Accountability.** The program has mechanisms for evaluating the quality of service it provides. It expects and obtains reporting from participating attorneys concerning the progress/outcome of referred cases. It has the capability to demonstrate compliance with requirements imposed by its funding source(s), and it has a grievance procedure for the internal resolution of disputes between attorneys and clients.
7. **Continuity.** The program has a form of governance, which ensures the program will survive changes in bar leadership, and has operational guidelines, which enable the program to survive a change in staff.
8. **Cost-effectiveness.** The program maximizes the level of high quality civil legal services it provides in relationship to the total amount of funding received.

**9. Minimization of barriers.** The program addresses in a deliberate manner linguistic, sensory, physical and cultural barriers to clients' ability to receive services from the program. The program does not create undue administrative barriers to client access.

**10. Understanding of ethical considerations.** The program operates in a way which is consistent with the Rules of Professional Conduct; client confidentiality is assured and conflicts of interest are avoided. The staff and volunteers are respectful of clients and sensitive to their needs.

**11. ABA Standards.** The program is designed to be as consistent with the ABA Standards for Programs Providing Civil Pro Bono Legal Services to Persons of Limited Means as possible.

No events, shortages or irregularities have occurred and no facts have been discovered which would make the financial statements provided to you materially inaccurate or misleading. To our knowledge there is nothing reflecting unfavorably upon the honesty or integrity of members of our organization. We have accounted for all known or anticipated operating revenue and expense in preparing our funding request.

We agree to provide human-interest stories promoting Pro Bono activities in a timely manner upon request of the Indiana Bar Foundation or Indiana Pro Bono Commission. We further agree to make ourselves available to meet with the Pro Bono Commission and/or the Indiana Bar Foundation to answer any questions or provide any material requested which serves as verification/source documentation for the submitted information.

**Explanation of items stricken from the above Letter of Representation:**

**It is understood that this Letter does not replace the Grant Agreement or other documents required by the Indiana Bar Foundation or Indiana Pro Bono Commission.**

**Signatures:**

William J. Hughes

**Judicial Appointee Signature**

6-30-04

**Date**

Laurie Beltz Boyd

6-30-04

## **BOONE COUNTY**

### **Number of Registered Attorneys: 76**

Percentage of Volunteer Attorneys who accepted a pro bono case in 2003: Not reported

Percentage of Attorneys who have not yet accepted a pro bono case: Not Reported

## **HAMILTON COUNTY**

### **Number of Registered Attorneys: 391**

Percentage of Volunteer Attorneys who accepted a pro bono case in 2003: 13%

Percentage of Attorneys who have not yet accepted a pro bono case: 35%

## **HANCOCK COUNTY**

### **Number of Registered Attorneys: 82; *Actual number of attorneys practicing in county: 44***

Percentage of Volunteer Attorneys who accepted a pro bono case in 2003: 36%

*or 47% actual*

Percentage of Attorneys who have not yet accepted a pro bono case: 0%

## **HENDRICKS COUNTY**

### **Number of Registered Attorneys: 124**

Percentage of Volunteer Attorneys who accepted a pro bono case in 2003: 6%

Percentage of Attorneys who have not yet accepted a pro bono case: 0%

## **JOHNSON COUNTY**

### **Number of Registered Attorneys: 142**

Percentage of Volunteer Attorneys who accepted a pro bono case in 2003: 44%

Percentage of Attorneys who have not yet accepted a pro bono case: 1%

## **MARION COUNTY**

### **Number of Registered Attorneys: 5,344**

Percentage of Volunteer Attorneys who accepted a pro bono case in 2003: 22%\*

Percentage of Attorneys who have not yet accepted a pro bono case: 32%\*

*\*[Three legal service providers did not provide volunteer attorney numbers]*

## **MORGAN COUNTY**

Number of Registered Attorneys: 57

Percentage of Volunteer Attorneys who accepted a pro bono case in 2003: 24%

Percentage of Attorneys who have not yet accepted a pro bono case: 0%

## **SHELBY COUNTY**

**Number of Registered Attorneys: 53**

Percentage of Volunteer Attorneys who accepted a pro bono case in 2003: 38%

Percentage of Attorneys who have not yet accepted a pro bono case: 0%

**NOTE:** Some attorneys register using their home address but practice law in another county. Therefore, the number of registered attorneys per county does not accurately reflect the actual number of attorneys practicing law in that county.

Furthermore, these statistics reflect only the volunteers and cases that are actually reported to Heartland, and also do not capture the pro bono work that attorneys perform outside the traditional legal services providers' network.

## **2005 PLAN SUMMARY**

- 1. Please write a brief summary of the 2005 grant request. Please include information regarding your district's planned activities. The grant request should cover needs to be addressed, methods, target audience, anticipated outcomes, and how past difficulties will be addressed.**

Heartland's main goal will continue to be to act as a facilitator and coordinator among the various legal services providers and county bar associations to offer support services to those existing programs. District 8 is somewhat unique in that well-established organizations have been offering free legal services for years and have formulated their own intake and referral network. Heartland has strived to complement those existing programs by offering additional support, including training and the recruitment of more volunteer attorneys. Heartland is experiencing a transition in leadership from the Honorable David Dryer to the Honorable William J. Hughes. At the request of Judge Hughes, the Heartland Board will meet this fall to discuss ways the legal service providers in District 8 can coordinate their service delivery mechanisms to maximize pro bono service availability.

Even though District 8 has these established legal services providers, Heartland provides a valuable back up for intake and referral to citizens who are unable to obtain legal services due to conflicts or case acceptance policies. (See Attachment) Additionally, through its Plan Administrator, Heartland will continue to offer brief services to those who need legal advice, or limited assistance with a legal matter that does not require the assistance of a volunteer attorney. Improving client referral policies between Heartland, the providers and social service agencies will continue to be a priority to provide better and more direct service to our clients.

Heartland will continue to offer support services to volunteer attorneys who accept pro bono cases through the following:

- a. Malpractice insurance
- b. Paralegal or law student assistance
- c. Free depositions
- d. Reimbursement of legal expenses
- e. Free investigative and service of process services
- f. Pro bono mediators
- g. Access to experienced attorneys for advice and counsel
- h. Free legal training

Established in 2004, Heartland will continue to work with Indiana Legal Services to explore expansion of the new ILS website to include legal forms, research and legal briefs for volunteer attorneys who have accepted a pro bono case.

Each year Heartland has co-sponsored legal training seminars as a means not only to train attorneys in poverty law areas but also to help recruit more volunteers. Heartland will continue to collaborate with other legal services providers and bar associations to offer at least three free training seminars, and will be encouraging the surrounding county bar associations to accept Heartland's offer to arrange for

this positive recruiting tool to its members and other county practitioners. Heartland will be an active participant in the recruiting and scheduling of attorneys for the annual Talk to a Lawyer Today project held on Dr. Martin Luther King's birthday in January 2005.

Heartland will continue its efforts to enact a rule for CLE credit for pro bono legal services by leading the statewide Committee through the rule amendment process. The Plan Administrator has already formed the committee and drafted a proposed rule, as well as obtained the endorsement from the state's Plan Administrators. This rule would provide the Plan Administrators with an additional incentive to help recruit attorneys to take pro bono cases.

Heartland continues to experience some obstacles to implementing its efforts to work with county bar associations to assist with and coordinate intake and referral, statistical reporting and local training seminars. These obstacles are found primarily in the counties surrounding Marion County and appear to emanate from a historical wariness in those counties of programs that appear to originate from Marion County. Heartland will continue to address those obstacles by providing assistance where requested that is tailored to the need and expectations of the community being served. In addition, Heartland will emphasize that it is currently chaired by a judge who is not from Marion County to further address that wariness. Judge Hughes has committed to meeting with the bar leadership from each surrounding county bar association to explore how Heartland can facilitate an increase in pro bono availability.

Heartland will continue its program to coordinate the use of paralegals with existing legal services providers to execute and notarize Powers Of Attorney, Living Wills and other advance directives to clients who are unable to leave their homes. This new initiative began in 2004 and approximately 25 clients have been served by volunteer paralegals in just a few months.

As a means to recognize and honor outstanding pro bono attorneys, Heartland will host its annual volunteer recognition event and bestow awards in a ceremony that is officiated by the state, federal and county judiciary. In an effort to expand exposure and to reduce costs for this event, Heartland will be hosting this ceremony in 2004 during the Indiana State Bar Association's fall meeting in Indianapolis. This event will again include the offering of free CLE ethics credit. If this strategy proves successful, then Heartland will try to coordinate this awards ceremony in 2005 with an existing event to improve attendance and reduce costs.

Recruitment of volunteers continues to be a primary objective as well as an obstacle. Through the past several years, Heartland has worked diligently to try to change the culture of pro bono in the private bar through individual attorney publicity, recognition ceremonies, free legal education, firm-wide recruitment, and the packaging of support services. Progress has been made, but the future of pro bono lies with law students, who are participating in pro bono projects in record numbers. These experiences and the law schools' recognition of pro bono service will instill in these prospective attorneys the need to automatically include pro bono in their legal career.



## **DISTRICT 8 INTAKE & REFERRAL STATISTICS**

Heartland Pro Bono Council has become an intake and referral resource for the district's low-income population seeking legal advice and/or pro bono representation. This service has evolved through the years as governmental agencies, the courts, the legal community and other agencies that provide services to the indigent, have learned about Heartland and the legal services that are offered.

Often individuals contact Heartland as an initial contact point to begin the process of where they should go for legal help. Heartland is in a unique position to refer individuals to the appropriate agency, county or district pro bono program, or answer some general legal questions to determine whether pro bono legal representation is even necessary.

The Plan Administrator has been able to offer "Brief Services" to individuals by researching court files, obtaining governmental documents, providing *pro se* forms and instructions, and making telephone calls on behalf of individuals to resolve potential disputes.

To reflect the large amount of time spent by the Plan Administrator providing these services to the indigent community, the following statistics were reconstructed for 2003 to supplement the preceding questions since this is a major function of Heartland Pro Bono Council.

Client Intake, Brief Service	35
Client Intake but failed to follow through:	32
Client Intake but hired private counsel:	6
Client Intake Over Income	9
Intake & Referral to other Legal Services	59
Client Intake & case declined	39
Client Intake, advice, non-legal	5
Client Intake, unspecified action	16
<b>TOTAL INTAKE &amp; REFERRAL</b>	<b>201</b>

## 2003 REPORT OF VOLUNTEER LAWYER CASES IN DISTRICT 8

Please attach additional pages for each pro bono provider that receives IOLTA funding, whether directly or indirectly, in your district. See the sample additional pro bono provider page 6A. Please list each attorney only once in the volunteer lawyer column but complete one line for each pro bono case for that attorney.

### Definitions:

Case: A legal matter referred to and accepted by a pro bono attorney volunteer.

Volunteer Lawyer: An attorney who has rendered pro bono service to at least one low-income client during the year or accepted a pro bono referral from the identified program. This does not include attorneys who are on the list of pro bono volunteers but who have never taken a case. The case numbers do not include cases screened, only cases actually referred to a pro bono attorney.

Case Type: Please use the abbreviations listed in Indiana Supreme Court Administrative Rule 8(B)(3)

**Name of Pro Bono Provider** (includes legal service provider, court, plan administrator, bar association, and other organizations):

### Heartland Pro Bono Council

IOLTA funding accounts for 100% of total pro bono provider budget for Heartland.

Volunteer Lawyer Name	County	Year Case Accepted	Year Case Closed	Number of Hours	Case Type
Daniel Schmidt	Marion	2003			DR
	Marion	2003			DR
	Marion	2002	2003	1	CP
David Lee	Marion	2003	2003	20	DR
Onyia Masa Udeozo	Marion	2003			DR
	Marion	2003			DR
Stephanie Jocham	Marion	2003			DR
John Babione	Marion	2003			CP
David Castor	Marion	2003			CP
Mitchell Pippin	Marion	2003	2003	10	CP Bankruptcy
Elizabeth Filipow	Marion	2003			DR
	Marion	2003			DR
John Hensley	Marion	2003			CP Bankruptcy
Diana Wann	Marion	2003	2003	23	GU
Charles Grahm	Marion	2003	2004	10	GU

Konstantine Orfanos	Marion	2003			CP
Michael Shanley	Marion	2003			DR
Michael Gaerter	Marion	2003			DR
Aaron Milewski	Marion	2003	2003	5	SC
Kevin Bailey	Marion	2003			CP Bankruptcy
	Marion	2003			CP
Teri Czajki	Marion	2003			DR
Robert Thopy	Marion	2003			CP
Patricia McKinnon	Marion	2003			DR
Davis Castor	Marion	2003			CP
James R. Corley	Marion	2003			DR
	Marion	2003			GU
Andrew Mana	Marion	2003	2003	1	AD
Sandra Burger	Marion	2003			CP State Admin.
	Marion	2003			DR
Marcee Feree	Marion	2003			DR
Eric Engebretson	Marion	2003	2003	1	AD
David Lee	Marion	2003	2003	6	DR
Jonathan Elrod	Marion	2003	2004	2	CP
Stephen Gross	Hamilton	2003			CP
James Moloy	Marion	2003			CP Bankruptcy
Kevin McGoff	Marion	2002	2003	25	DR
Amanda Blystone	Marion	2001	2003	69	DR
Shanie VanOstrand	Marion	2001	2003	10	DR
Randall Kaltenmark	Marion	2001	2003	1	CP
Meggan Frye	Marion	2002	2003	40	DR
Mike Wilkins	Marion	2002	2003	30	SS
Doug Kaiser	Marion	2002	2003	14	DR
Wilburn Lowry	Marion	2002	2003	10	DR
Terry Hall	Marion	2002	2003	85	CP
Melissa Avery	Marion	2001	2003	56	DR
Danielle Gregory	Marion	2002	2003	28	DR
David M. Henn	Marion	2002	2003	8	SC
KiKi Gaither	Marion	2002	2003	15	DR
Michael Getty	Marion	2002	2003	30	DR
Barbara Malone	Marion	2002	2003	20	DR
Tanya Hatfield	Marion	2002	2003	20	DR
Lisa Maxwell-Frieden	Marion	2002	2003	35	DR
Gale Phelps	Marion	2002	2003	27	DR
Bruce Brattain	Marion	2002	2003	1	Bankruptcy
David Pumphrey	Marion	2002	2003	1.5	AD
Ralph Dowling	Marion	2002	2003	87	DR
Ron Waicukawski	Marion	2002	2003	9	SC

John Manley	Marion	2002	2003	7	MC
Patty Stallwood	Marion	2002	2003	15	DR
James Brauer	Marion	2002	2003	4	DR
Tony Abbott	Marion	2002	2003	4	ES
Patrick Murphy	Marion	2002	2003	15	DR
Victoria Deak	Marion	2002	2003	2	DR
Bart Carroll	Hancock	2002	2003	10	DR
Bradley Dougherty	Marion	2002	2003	20	GU
Priscilla White	Marion	2002	2003	2	GU
Jerry Moss	Marion	2002	2003	7	CP
Allan Reid	Marion	2002	2003	3	DR
Michael Gottschlich	Marion	2002	2003	10	Fed. SS
Doreen Philpot	Marion	2002	2003	13	CP Bankruptcy
Rodney Richardson	Marion	2002	2003	10	DR
Cynthia Marcus	Marion	2002	2003	25	DR
Michael Delehanty	Marion	2002	2003	8	CP
Mary Hoeller	Marion	2002	2003	8	CP Adm. Unemp
Deborah Stencel	Marion	2002	2003	20	DR
Mary Doherty	Marion	2002	2003	18	CP
Rod Tucker	Marion	2002	2003	20	CP
Gina Giacone	Marion	2002	2003	4	GU
Annette Biesecker	Marion	2002	2003	20	PO
Mario Garcia	Marion	2002	2003	55	CP
Daniel Sattizahn	Marion	2003	2003	30	DR
DeAnn Habegger	Marion	2002	2003	20	DR
Kent Newton	Marion	2003			GU
Beltz, Laurie	Marion	2002	2003	6	GU
Beltz, Laurie	Marion	2002	2003	24	PO
Beltz, Laurie	Marion	2003	2003	32	DR/GAL
Miller, Kim	Marion	2003			DR
Michelsen, Jan	Marion	2002	2003	20	DR
TOTAL			TOTAL		TOTAL
OVERALL TOTAL: <b>117 Attorneys</b>			OVERALL TOTAL: <b>1,601 Hours</b>		OVERALL TOTAL: <b>136 Cases</b>

## NEIGHBORHOOD CHRISTIAN LEGAL CLINIC

IOLTA Funding accounted for 5% of total pro bono provider budget

Volunteer Lawyer Name		County	Year Case Accepted	Year Case Closed	Number of Hours	Case Type
LilaBerdia	Batties	Marion	2003	2004	1	CP
LilaBerdia	Batties	Marion	2003	2004	1	CP
Michelle	Blank	Hamilton	2003	n/a	3	bankruptcy
Amanda	Blystone	Marion	2002	2003	61.7	CP
Elaine	Boyd	Marion	2002	n/a	3	CP
John	Boyd	Marion	2003	n/a	3	MI
Laurie	Boyd	Marion	2003	n/a	3	EU
Laurie	Boyd	Marion	2003	n/a	3	GU
Marshelle	Broadwell	Marion	2002	2004	3	CP
Marshelle	Broadwell	Marion	2002	n/a	3	CP
Philip	Burroughs	Marion	2003	2004	3	MF
David	Castor	Marion	2003	2003	13.5	CP
Dana	Childress-Jones	Hamilton	2002	2003	3	CP
David	Clase	Marion	2003	n/a	3	CP
Virgene	Cline	Marion	2003	n/a	3	bankruptcy
Michael	Cork	Marion	2002	2003	10	CP
Michael	Cork	Marion	2002	2003	8	CP
Michael	Cork	Marion	2002	2003	3	CP
Michael	Cork	Marion	2003	2004	3	CP
Marcia	Cossell	Marion	2003	n/a	3	bankruptcy
Paul	Cummings	Marion	2003	2004	1	CP
Anastasia	Demos	Marion	2003	2003	5	CT
Sean	Devenney	Marion	2003	n/a	3	CP
Darrell	Dolan	Marion	2002	2003	3	bankruptcy
Darrell	Dolan	Marion	2002	2004	3	bankruptcy
Darrell	Dolan	Hendricks	2002	2004	3	bankruptcy
Darrell	Dolan	Marion	2003	2003	3	bankruptcy
Darrell	Dolan	Marion	2003	2004	3	bankruptcy
Darrell	Dolan	Marion	2003	2004	3	bankruptcy
Ralph	Dowling	Marion	2003	2003	3	DR
Robert	Ebbs	Marion	2001	n/a	3	bankruptcy
Robert	Ebbs	Marion	2001	2004	3	bankruptcy
Robert	Ebbs	Hamilton	2001	2004	3	bankruptcy
Robert	Ebbs	Marion	2001	2004	3	bankruptcy
Robert	Ebbs	Marion	2002	2004	3	bankruptcy
Robert	Ebbs	Marion	2002	2004	3	bankruptcy
Robert	Ebbs	Marion	2002	n/a	3	bankruptcy
Robert	Ebbs	Marion	2002	n/a	3	bankruptcy
Elizabeth	Edwards	Marion	2003	2003	1	CP
Kurt	Eisgruber	Marion	2003	n/a	3	CP

James	Fisher	Marion	2002	n/a	3	CP
Danielle	Gregory	Marion	2003	2003	4.4	GU
Danielle	Gregory	Marion	2003	2004	3	CP
Phil	Guba	Marion	2003	2004	3	GU
Angela	Hale	Hamilton	2003	2003	3	TAX
Thomas	Hansen	Marion	2003	n/a	3	bankruptcy
Katherine	Harvey	Marion	2003	2004	3	bankruptcy
John	Haskins	Marion	2003	n/a	1	CP
John	Henry	Marion	2003	n/a	3	bankruptcy
John	Hensley	Marion	2002	2003	3	bankruptcy
Celeste	Jaffe	Marion	2002	n/a	3	CP
Celeste	Jaffe	Marion	2002	n/a	3	CP
Celeste	Jaffe	Marion	2002	n/a	3	CP
Todd	Janzen	Marion	2003	n/a	3	EN
Linda	Jelks	Marion	2003	n/a	3	GU
Sheila	Jenkins	Marion	2003	n/a	3	SS appeal
Tom	John	Marion	2002	2004	3	CP
Art	Johnson	Marion	2002	2003	3	CP
Robert	Johnson	Marion	2001	n/a	3	CP
John	Joyce	Morgan	2003	n/a	3	EU
David	Keen	Marion	2002	2004	3	CP
Ibrahim	Khairy	Knox	2003	2004	3	immigration
Julie	Lang	Marion	2003	2004	3	CP
Julie	Lang	Marion	2003	2004	3	CP
Julie	Lang	Marion	2003	2003	3	CP
Adam	Lenkowsky	Marion	2003	n/a	3	CP
Adam	Lenkowsky	Marion	2003	n/a	3	CP
Geoffrey	Lohman	Marion	2003	n/a	3	CP
Steven	Lovern	Marion	2003	n/a	3	bankruptcy
John	Maley	Marion	2000	2004	3	CP
Dennis	McCrosson	Marion	2003	n/a	1	CP
Dennis	McCrosson	Marion	2003	n/a	3	CP
Patricia	McKinnon	Marion	2000	2002	3	CP
Patricia	McKinnon	Marion	2003	2004	3	CP
Jeanne	McMains	Marion	2003	n/a	3	EU
John	McManus	Marion	2003	n/a	3	bankruptcy
Mark	Morrell	Marion	2002	2003	20	EU
Thomas	O'Gara	Marion	2003	2004	1	CP
Judy	Pippin	Marion	2003	2003	7.5	CP
William	Pope	Marion	2003	2003	3	CP
William	Pope	Marion	2003	2003	3	CP
Steve	Russell	Marion	2000	2004	3	CP
Bradley	Schulz	Marion	2002	2002	20	CP
Clifford	Shepard	Hamilton	2002	2004	3	bankruptcy
John	Sommer	Marion	2002	n/a	3	CP
Tamatha	Stevens	Marion	2002	2002	3	GU
Tamatha	Stevens	Marion	2003	n/a	3	EU

Tamatha	Stevens	Marion	2003	n/a	3	GU
Roscoe	Stovall	Marion	2003	n/a	3	CP
James	Strenski	Greenwood	2002	2003	20	immigration
Matthew	Tarkington	Marion	2002	n/a	3	bankruptcy
Kim	Tekolste	Marion	2002	2003	1	bankruptcy
Kim	Tekolste	Marion	2002	2003	0.5	bankruptcy
Harold	Thurston	Hamilton	2003	n/a	1	CP
Lori	Torres	Marion	2001	n/a	3	bankruptcy
Lori	Torres	Marion	2003	n/a	3	CP
Rodney	Tucker	Marion	2001	n/a	3	CP
Rodney	Tucker	Hamilton	2002	2004	3	CP
Michael	Turner	Marion	2002	2004	3	bankruptcy
Michael	Turner	Greenwood	2003	n/a	3	bankruptcy
Lynn	Tyler	Marion	2000	n/a	3	bankruptcy
Kurt	Webber	Morgan	2003	2004	3	CP
Mary Ann	Wunder	Marion	2003	2004	3	CP
Mary Ann	Wunder	Marion	2003	n/a	3	CP
Claudia	Zacks	Marion	2003	n/a	1	CP
Claudia	Zacks	Greenwood	2003	n/a	3	GU
Anthony	Zapata	Marion	2002	2003	3	GP
<b>Total Attorneys: 72</b>					<b>563.1</b>	

#### Miscellaneous Volunteer Services

Laurie	Boyd	INTAKE			2	
Jennifer	Brown	"			2	
John	Broyles	"			2	
Mark	Colucci				2	
Mark	Colucci				2	
Mark	Colucci				3	
Mark	Colucci				3	
Mark	Colucci				2	
Mark	Colucci				2	
Michael	Cork				7	
Karen	Dutcher				2	
Robert	Ebbs				1	
Elizabeth	Edwards				5	
Monica	Fennell				2	
Angela	Hale				1	
Angela	Hale				1	
Angela	Hale				2	
Angela	Hale				2	
Herb	Jensen				1	
Art	Johnson				3	
Art	Johnson				2	
Julie	Lang				2	
Julie	Lang				2	
Julie	Lang				2	
Julie	Lang				3	

Julie	Lang	INTAKE			2	
Judge Robert	Lutz	"			1	
R J	McConnall				2	
Patricia	McKinnon				1.5	
Kent	Newton				1	
Judy	Pippin				1	
Judy	Pippin				1	
Judy	Pippin				2	
Bill	Pope				1	
William	Pope				3	
Jackie	Pugh				1	
Jackie	Pugh				1	
Jackie	Pugh				2	
MaryAnn	Ruegger				1	
Mary Ann	Ruegger				3	
MaryAnn	Ruegger				1	
MaryAnn	Ruegger				1	
Mary Ann	Ruegger				2	
Mary Ann	Ruegger				2	
Matt	Tarkington				2	
Kim	Tekolste				3	
Lori	Torres				2	
Rod	Tucker				1	
Rod	Tucker				1	
Rod	Tucker				2	
Rod	Tucker				2	
James	Van Cleave				5.5	
James	Van Cleave				7.5	
<b>Total Attorneys: 26</b>					<b>113.5</b>	



## 2003 INDIANA UNIVERSITY-INDIANAPOLIS LAW STUDENT PRO BONO ACTIVITY REPORT

IOLTA funding accounts for 30 % of total pro bono provider budget.

<b>Legal Service Provider Agency or Organization (include Bar Associations)</b>	<b>Number of Volunteer Law Students</b>	<b>Number of Law Student Hours Reported on Cases in 2003</b>
Bartholomew Area Legal Aid	1	233
Child Advocates (Marion County)	2	63
Indianapolis Bar Association's Ask a Lawyer	13	29
Indiana Civil Liberties Union	4	581
Indiana Civil Rights Commission	1	23
Indiana Housing Commerce Financing Authority	1	128
Indiana Legal Services	3	466
Indiana State Bar Association's Ask a Lawyer	1	3
Judge Dreyer's Court	1	187
Kids' Voice	2	84
Neighborhood Christian Legal Clinic	12	557
Protective Order Pro Bono Project, Inc	16	118
Volunteer Income Tax Assistance (VITA) Program	8	125
<b>TOTAL: 13</b>	<b>TOTAL: 65</b>	<b>TOTAL: 2597</b>

## Hamilton County Bar Association

**IOLTA funding accounts for 30% of total pro bono provider budget.**

<b>Volunteer Lawyer Name</b>	<b>County</b>	<b>Year Case Accepted</b>	<b>Year Case Closed</b>	<b>Number of Hours</b>	<b>Case Type</b>
Casati, Michael	Hamilton	2003	2003	12	DR
Church, Douglas	Hamilton	2003	2003	16	DR
Church, Jordan	Hamilton	2003	2003	5	DR
	Hamilton	2003	2003	5	DR
	Hamilton	2003	2003	5	DR
	Hamilton	2003	2003	5	DR
Curts, Jay T.	Hamilton	2003			EU
Hardin, Steve	Hamilton	2003			DR
Jenkins, Kathryn	Hamilton	2003	2003	10	DR
Terry, John S.	Hamilton	2003	2003	1.5	EU
Wyatt, Scott	Hamilton	2003	2003		DR
Schierholz, Oliver	Hamilton	2003	2003	15.1	Bankruptcy
Berzups, Eric	Hamilton	2003			DR
Blumenthal, Shawn	Hamilton	2003	2003	12	DR
Fleck, Sean	Hamilton	2003			GU
Haymaker, Shelley Hiles	Hamilton	2003			DR
Pennamped, Burce	Hamilton	2003	2003	1.5	DR
Attorney at Church, Church Hittle & Antrim	Hamilton	2003			DR
Attorney at Church, Church Hittle & Antrim	Hamilton	2003			DR
Attorney at Church, Church Hittle & Antrim	Hamilton	2003			DR
Attorney at Church, Church Hittle & Antrim	Hamilton	2003			DR
<b>TOTAL: 18 Attorneys</b>	<b>TOTAL: 21</b>	<b>CASES</b>	<b>21</b>	<b>TOTAL</b>	<b>88.1 HOURS</b>

**OVERALL TOTAL ATTORNEYS: 210**

**OVERALL TOTAL CASES: 264**

**OVERALL TOTAL LAW STUDENTS: 71    OVERALL TOTAL HOURS: 2,252**

## **2003 REPORT OF VOLUNTEER LAWYER LIMITED INFORMATION ACTIVITY IN DISTRICT 8**

This limited legal information chart can include activities such as pro se clinics and call-in or walk-in informational services.

Please attach additional pages for each pro bono provider that receives IOLTA funding, whether directly or indirectly, in your district. See the sample additional pro bono provider page 7A. Please list each attorney only once in the volunteer lawyer column but complete one line for each type of legal information activity for that attorney.

**Name of Pro Bono Provider** (includes legal service provider, court, plan administrator, bar association, and other organizations):

### **HEARTLAND PRO BONO COUNCIL, INC.**

<b>Volunteer Lawyer Name</b>	<b>County</b>	<b>Type of Activity</b>	<b>Number of Hours</b>
Matt McQueen	Marion	TTALT	2
Jennifer Gauger	Marion	TTALT	2
Lea Ellingwood	Marion	TTATL	2
Geoff Davis	Marion	TTALT	2
Stacia Demos	Marion	TTALT	2
Mike Borschel	Marion	TTALT	2
Kathleen Angelone	Marion	TTALT	2
David Stewart	Marion	TTALT	2
Marcelle Mayard-Henry	Marion	TTALT	2
Ayesha Patterson	Marion	TTALT	2
Kevin Greenlee	Marion	TTLAT	2
Juval O. Scott	Marion	TTALT	2
Brad Gavin	Marion	TTALT	2
Victoria Gutwein	Marion	TTALT	2
Dannette Morgan	Johnson	TTALT	2
Joseph Merrick	Marion	TTALT	2
Michael Vertesch	Marion	TTLAT	2
John Conlon	Marion	TTALT	2
Scott Newton	Marion	TTALT	2
Maxine Russell	Marion	TTLAT	2

<b>Ryan Johanningsmeier</b>	<b>Marion</b>	<b>TTALT</b>	<b>2</b>
<b>Robert Bugher</b>	<b>Marion</b>	<b>TTALT</b>	<b>2</b>
<b>Karen Hsu</b>	<b>Marion</b>	<b>TTALT</b>	<b>2</b>
<b>Mary DePrez</b>	<b>Marion</b>	<b>TTALT</b>	<b>2</b>
<b>Maraiteresa Carrelli</b>	<b>Marion</b>	<b>TTALT</b>	<b>6</b>
<b>Mara Synder</b>	<b>Marion</b>	<b>TTALT</b>	<b>2</b>
<b>Fran Quigley</b>	<b>Marion</b>	<b>TTALT</b>	<b>2</b>
<b>Doug Crawford</b>	<b>Marion</b>	<b>TTALT</b>	<b>2</b>
<b>Julie Payne</b>	<b>Marion</b>	<b>TTALT</b>	<b>2</b>
<b>Kimberly Wheeler</b>	<b>Marion</b>	<b>TTLAT</b>	<b>2</b>
<b>Gene Schulsted</b>	<b>Marion</b>	<b>TTALT</b>	<b>2</b>
<b>Liberty Roberts</b>	<b>Marion</b>	<b>TTALT</b>	<b>2</b>
<b>Sandra Griesemer</b>	<b>Marion</b>	<b>TTALT</b>	<b>2</b>
<b>Eric Redman</b>	<b>Marion</b>	<b>TTALT</b>	<b>2</b>
<b>Bob Hurley</b>	<b>Marion</b>	<b>TTALT</b>	<b>2</b>
<b>Steve Fulk</b>	<b>Marion</b>	<b>TTALT</b>	<b>2</b>
<b>Martin Allain</b>	<b>Marion</b>	<b>TTLAT</b>	<b>2</b>
<b>Carol Wyatt</b>	<b>Marion</b>	<b>TTALT</b>	<b>2</b>
<b>Susan Brooke</b>	<b>Marion</b>	<b>TTALT</b>	<b>2</b>
<b>Bob Crane</b>	<b>Marion</b>	<b>TTALT</b>	<b>2</b>
<b>Steve Spence</b>	<b>Marion</b>	<b>TTALT</b>	<b>2</b>
<b>Richard Bash</b>	<b>Marion</b>	<b>TTALT</b>	<b>2</b>
<b>Ed Harris</b>	<b>Marion</b>	<b>TTALT</b>	<b>2</b>
<b>Jerome Kelly</b>	<b>Marion</b>	<b>TTALT</b>	<b>2</b>
<b>Rob Gauss</b>	<b>Marion</b>	<b>TTLAT</b>	<b>2</b>
<b>Deanna Smith</b>	<b>Marion</b>	<b>TTALT</b>	<b>2</b>
<b>Patricia McKinnon</b>	<b>Marion</b>	<b>TTALT</b>	<b>8</b>
<b>Pen Cosby</b>	<b>Marion</b>	<b>Internet Article</b>	<b>10</b>
<b>Cindy Muse</b>	<b>Marion</b>	<b>Internet Article</b>	<b>12</b>
<b>James Gutting</b>	<b>Marion</b>	<b>Internet Article</b>	<b>13</b>
<b>Angela Imel</b>	<b>Marion</b>	<b>Internet Article</b>	<b>12</b>
<b>Stephanie Jocham</b>	<b>Marion</b>	<b>Internet Article</b>	<b>10</b>
<b>John Baxter</b>	<b>Marion</b>	<b>Internet Article</b>	<b>10</b>
<b>Tom Engle</b>	<b>Marion</b>	<b>Internet Article</b>	<b>10</b>
<b>Michelle Blank</b>	<b>Marion</b>	<b>Internet Article</b>	<b>10</b>
<b>Robert McLaughlin</b>	<b>Marion</b>	<b>Internet Articles</b>	<b>20</b>
<b>Carl Hayes</b>	<b>Marion</b>	<b>Internet Article</b>	<b>10</b>
<b>8 Ice Miller Summer Legal Interns</b>	<b>Marion</b>	<b>8 Internet Articles</b>	<b>80</b>
<b>Donald Snemis</b>	<b>Marion</b>	<b>Internet Articles Supervisor</b>	<b>20</b>
<b>Suzanne Conger</b>	<b>Hendricks</b>	<b>Ask a Lawyer</b>	<b>4</b>
<b>John Payton</b>	<b>Hendricks</b>	<b>Ask a Lawyer</b>	<b>4</b>
<b>Ben Comer</b>	<b>Hendricks</b>	<b>Ask a Lawyer</b>	<b>4</b>
<b>Dave Kenninger</b>	<b>Hendricks</b>	<b>Ask a Lawyer</b>	<b>4</b>

<b>Beth Penn-Dixon</b>	<b>Hendricks</b>	<b>Ask a Lawyer</b>	<b>4</b>
<b>Kate Kuehn</b>	<b>Hendricks</b>	<b>Ask a Lawyer</b>	<b>4</b>
<b>Nick Schmutte</b>	<b>Hendricks</b>	<b>Ask a Lawyer</b>	<b>4</b>
<b>Cyndi Helfrich</b>	<b>Hendricks</b>	<b>Ask a Lawyer</b>	<b>4</b>
<b>Bryan Aydelotte</b>	<b>Hendricks</b>	<b>Ask a Lawyer</b>	<b>4</b>
<b>Bob McDowell</b>	<b>Hendricks</b>	<b>Ask A Lawyer</b>	<b>4</b>
<b>Thett Stuard</b>	<b>Hendricks</b>	<b>Ask A Lawyer</b>	<b>4</b>
<b>TOTAL: 77 ATTORNEYS</b>		<b>TOAL HOURS: 365</b>	

“TTALT”: Talk to a Lawyer Today Project held on MLK Day, 2003.

“Internet Article”: Indiana Legal Services Web Site project

“Ask a Lawyer”: Hendricks County Bar Association Project held in Danville and Avon on July 15, 2003.

**Name of Pro Bono Provider** (includes legal service provider, court, plan administrator, bar association, and other organizations):

## INDIANAPOLIS BAR ASSOCIATION

IOLTA funding accounts for 31% of total pro bono provider budget.

<b>Volunteer Lawyer Name</b>	<b>County</b>	<b>Type of Activity</b>	<b>Number of Hours</b>
Debbie Anderson, Attorney at Law	<b>Marion</b>	Black Expo	2
Lawrence Arany, Attorney at Law	<b>Marion</b>	Black Expo	2
James Boyers, Wooden & McLaughlin, LLP	<b>Marion</b>	Black Expo	2
Sarah Burkman, Indiana Legislative Services	<b>Marion</b>	Black Expo	2
David Byers, Holwager Byers & Caughey	<b>Marion</b>	Black Expo	2
Jan Carroll, Barnes & Thornburg	<b>Marion</b>	Black Expo	2
Jane Conley, Marion Superior Court	<b>Marion</b>	Black Expo	2
Amy DeBrot, Young Riley Dudley & DeBrot	<b>Marion</b>	Black Expo	2
Jody DeFord, Barnes & Thornburg	<b>Marion</b>	Black Expo	2
Richard Paul Harper, Law Office of Paul Harper	<b>Marion</b>	Black Expo	2
Edward Harris, III, Attorney at Law	<b>Marion</b>	Black Expo	2
Hon. Grant Hawkins, Superior Criminal Court	<b>Marion</b>	Black Expo	2
Pequita Jay-Buis, Buis & Associates	<b>Marion</b>	Black Expo	2
Stacy Kelley, Lewis & Hill, LLP	<b>Marion</b>	Black Expo	2
Heather Kidwell, Baker & Daniels	<b>Marion</b>	Black Expo	2
Hon. Paula Lapossa, Center Township Small Claims Court	<b>Marion</b>	Black Expo	2
James Mellowitz, Price Jackson Waicukauski & Mellowitz, PC	<b>Marion</b>	Black Expo	2
Thomas O’Gara, Sommer Barnard Ackerson, PC	<b>Marion</b>	Black Expo	2
Kimberly Powell, Attorney at Law	<b>Marion</b>	Black Expo	2
Anthony Prather, Barnes & Thornburg	<b>Marion</b>	Black Expo	2
Suzanne Robinson, Lewis & Kappes	<b>Marion</b>	Black Expo	2
Paula Schaefer, Ruppert & Schaefer, P.C.	<b>Marion</b>	Black Expo	2
Joel Schumm, IUPUI School of Law	<b>Marion</b>	Black Expo	2
John Snethen, Indiana Tax Court	<b>Marion</b>	Black Expo	2
Douglas Stephens, Attorney at Law	<b>Marion</b>	Black Expo	2
Richard Aikman, Jr., Stewart & Irwin	<b>Marion</b>	IBA Homeless Project	6
Bruce Alvarado, Orfanos & Alvarado	<b>Marion</b>	IBA Homeless Project	12
Thomas Barnard, Sommer Barnard Ackerson, P.C.	<b>Marion</b>	IBA Homeless Project	12
Richard Darst, Cohen Garelick & Glazier	<b>Marion</b>	IBA Homeless Project	8
Pat Elward, Bingham McHale, LLP	<b>Marion</b>	IBA Homeless Project	8
Michael Fisher, Attorney at Law	<b>Marion</b>	IBA Homeless Project	8
Robert L. Gauss, Ice Miller	<b>Marion</b>	IBA Homeless Project	8
Jerry Gregerson, Bingham McHale, LLP	<b>Marion</b>	IBA Homeless Project	12
Andrew Hull, Hoover Hull Baker & Heath	<b>Marion</b>	IBA Homeless Project	8

David Jose, Krieg DeVault, LLP	<b>Marion</b>	IBA Homeless Project	12
Margaret Lewis, Attorney at Law	<b>Marion</b>	IBA Homeless Project	8
Robert Maas, Stark Doninger & Smith	<b>Marion</b>	IBA Homeless Project	12
Larry Minnix, Brattain & Minnix	<b>Marion</b>	IBA Homeless Project	12
W. Scott Montross, Townsend & Montross	<b>Marion</b>	IBA Homeless Project	12
John Perrin, Attorney at Law	<b>Marion</b>	IBA Homeless Project	8
Eric Riegner, Locke Reynolds, LLP	<b>Marion</b>	IBA Homeless Project	8
Martin Risacher, Church Church Hittle & Antrim	<b>Marion</b>	IBA Homeless Project	8
Brent Taylor, Baker & Daniels	<b>Marion</b>	IBA Homeless Project	8
L. Craig Turner, Dutton & Overman	<b>Marion</b>	IBA Homeless Project	8
Mary Watts, Bingham McHale	<b>Marion</b>	IBA Homeless Project	8
Allison Wharry, Ice Miller	<b>Marion</b>	IBA Homeless Project	8
Ana Alfonso-Pallikan, Ice Miller	<b>Marion</b>	Fiesta 2003	2
Lawrence Arany, Attorney at Law	<b>Marion</b>	Fiesta 2003	2
James Brown, Goodin Abernathy & Miller	<b>Marion</b>	Fiesta 2003	2
Sonia Das, Lewis & Wagner	<b>Marion</b>	Fiesta 2003	2
Sharon Funcheon Murphy, Lewis & Wagner	<b>Marion</b>	Fiesta 2003	2
Greg Loyd, Marion County Prosecutors Office	<b>Marion</b>	Fiesta 2003	2
Jeffrey Papa, Barnes & Thornburg	<b>Marion</b>	Fiesta 2003	2
Marisol Sanchez, Bose McKinney & Evans	<b>Marion</b>	Fiesta 2003	2
Anthony Zapata, Indiana Supreme Court	<b>Marion</b>	Fiesta 2003	2
Sonia Chen, Indiana Court of Appeals	<b>Marion</b>	Earned Income Tax Credit	20
Heather Kidwell, Baker & Daniels	<b>Marion</b>	Earned Income Tax Credit	12
David Remondini, Indiana Supreme Court	<b>Marion</b>	Earned Income Tax Credit	2
David Adams, Bingham McHale	<b>Marion</b>	Ask A Lawyer	4
Adrian Allen, Bose McKinney & Evans, LLP	<b>Marion</b>	Ask A Lawyer	4
Bryan Babb, Bose McKinney & Evans, LLP	<b>Marion</b>	Ask A Lawyer	4
Jesssica Barth, Baker & Daniels	<b>Marion</b>	Ask A Lawyer	2
John Bjerke, Eli Lilly and Company	<b>Marion</b>	Ask A Lawyer	2
Daniel Bradford, Attorney at Law	<b>Marion</b>	Ask A Lawyer	4
John Broyles, Broyles Kight & Ricafort, LLP	<b>Marion</b>	Ask A Lawyer	2
Sarah Burkman, Indiana Legislative Services Agency	<b>Marion</b>	Ask A Lawyer	2
Alice Burr, Indiana Legal Services Organization, Inc.	<b>Marion</b>	Ask A Lawyer	4
Stephanie Crawford, Lewis & Wagner	<b>Marion</b>	Ask A Lawyer	2
Melissa De Groff, Dann Pecar Newman & Kleiman, P.C.	<b>Marion</b>	Ask A Lawyer	4
Jim Dimos, Locke Reynolds, LLP	<b>Marion</b>	Ask A Lawyer	2
Lucy Dollens, Locke Reynolds, LLP	<b>Marion</b>	Ask A Lawyer	2
Christine Douglas, Douglas Law Offices	<b>Marion</b>	Ask A Lawyer	2
Pat Drewry, Drewry Simmons Pitts & Vornehm, LLP	<b>Marion</b>	Ask A Lawyer	2
Mark Dutton, Law Offices of Peter Francis Geraci	<b>Marion</b>	Ask A Lawyer	2
Stephanie Fairfield, Maurer Rifkin & Hill, P.C.	<b>Marion</b>	Ask A Lawyer	2
Troy Farmer, Baker & Daniels	<b>Marion</b>	Ask A Lawyer	4
John Ferree Chubb Group of Insurance Companies	<b>Marion</b>	Ask A Lawyer	4
Bill Freihofer, Kortepeter McPherson Hux Freihofer & Minton	<b>Marion</b>	Ask A Lawyer	2
Phyllis Garrison, McMains Foster & Morse, P.C.	<b>Marion</b>	Ask A Lawyer	4
DeeAnn Habegger, Ice Miller	<b>Marion</b>	Ask A Lawyer	2
Ken Harshey, Attorney at Law	<b>Marion</b>	Ask A Lawyer	2
Christine Hickey, Rubin & Levin, P.C.	<b>Marion</b>	Ask A Lawyer	2
Jay Jaffe, Baker & Daniels	<b>Marion</b>	Ask A Lawyer	2

Pequita Jay-Buis, Buis & Associates	<b>Marion</b>	Ask A Lawyer	4
Tammy Koch, Drewry Simmons Pitts & Vornehm, LLP	<b>Marion</b>	Ask A Lawyer	2
Anita Kolkmeier, Indiana Secretary of State's Office	<b>Marion</b>	Ask A Lawyer	2
Karol Krohn, Indiana Office of Utility Consumer Counsel	<b>Marion</b>	Ask A Lawyer	2
Robert Lancaster, Indiana University School of Law	<b>Marion</b>	Ask A Lawyer	4
Paula Lapossa, Attorney at Law	<b>Marion</b>	Ask A Lawyer	2
Samuel Laurin, Bose McKinney & Evans, LLP	<b>Marion</b>	Ask A Lawyer	4
Mike Lewinsky, Ice Miller	<b>Marion</b>	Ask A Lawyer	2
Jeffrey Lund, Barnes & Thornburg	<b>Marion</b>	Ask A Lawyer	2
Rick Malad, Cohen & Malad, LLP	<b>Marion</b>	Ask A Lawyer	4
Melanie Margolin, Locke Reynolds LLP	<b>Marion</b>	Ask A Lawyer	2
Andrea Marsh, Sommer Barnard Ackerson, P.C.	<b>Marion</b>	Ask A Lawyer	2
Lisa Maxwell Friedman, O'Koon Hintermeister, PLLC	<b>Marion</b>	Ask A Lawyer	2
Mike McNally, Ice Miller	<b>Marion</b>	Ask A Lawyer	2
Molly Miller, Office of the Chapter 13 Trustee	<b>Marion</b>	Ask A Lawyer	4
Jeff Mortier, Locke Reynolds, LLP	<b>Marion</b>	Ask A Lawyer	2
Shiv O'Neil, Baker & Daniels	<b>Marion</b>	Ask A Lawyer	2
Carol Orbison, Attorney General's Office	<b>Marion</b>	Ask A Lawyer	2
Greg Padgett, Barnes & Thornburg	<b>Marion</b>	Ask A Lawyer	4
Nick Pappas, Locke Reynolds, LLP	<b>Marion</b>	Ask A Lawyer	2
Sandra Perry, Bose McKinney & Evans, LLP	<b>Marion</b>	Ask A Lawyer	2
John Prescott, Ice Miller	<b>Marion</b>	Ask A Lawyer	2
Ted Randall, Lee Burns & Cossell, LLP	<b>Marion</b>	Ask A Lawyer	2
Rodney Retzner, Krieg DeVault, LLP	<b>Marion</b>	Ask A Lawyer	2
Beth Riga, Bose McKinney & Evans, LLP	<b>Marion</b>	Ask A Lawyer	2
Brenda Roper, UAW	<b>Marion</b>	Ask A Lawyer	2
James Sabina, State Farm Litigation Counsel	<b>Marion</b>	Ask A Lawyer	2
Jason Saunders, Drewry Simmons Pitts & Vornehm, LLP	<b>Marion</b>	Ask A Lawyer	2
Matthew Schafer, Drewry Simmons Pitts & Vornehm, LLP	<b>Marion</b>	Ask A Lawyer	2
William Schemmel, Attorney at Law	<b>Marion</b>	Ask A Lawyer	2
Marc Sedwick, Attorney at Law	<b>Marion</b>	Ask A Lawyer	2
Heather Sewell, Indiana Secretary of State's Office	<b>Marion</b>	Ask A Lawyer	2
Thomas Shea, Barnes & Thornburg	<b>Marion</b>	Ask A Lawyer	2
David Simmons, Drewry Simmons Pitts & Vornehm, LLP	<b>Marion</b>	Ask A Lawyer	4
Deana Smith, Reames Hoover & Smith	<b>Marion</b>	Ask A Lawyer	2
Robert Solloway, Ice Miller	<b>Marion</b>	Ask A Lawyer	2
Christopher Taylor, Lewis & Kappes, P.C.	<b>Marion</b>	Ask A Lawyer	4
Adina Teske, O'Koon Hintermeister, PLLC	<b>Marion</b>	Ask A Lawyer	2
Jennifer Thornburg, Attorney at Law	<b>Marion</b>	Ask A Lawyer	2
Harold Thurston, Attorney at Law	<b>Marion</b>	Ask A Lawyer	2
Dana Tilford, Law Offices of Peter Francis Geraci	<b>Marion</b>	Ask A Lawyer	2
Joel Tragesser, Locke Reynolds, LLP	<b>Marion</b>	Ask A Lawyer	2
David Troll, Baker & Daniels	<b>Marion</b>	Ask A Lawyer	2
Lynn Tyler, Barnes & Thornburg	<b>Marion</b>	Ask A Lawyer	2
Richard VanRheenen, Bose McKinney & Evans, LLP	<b>Marion</b>	Ask A Lawyer	4
David Vornehm, Drewry Simmons Pitts & Vornehm, LLP	<b>Marion</b>	Ask A Lawyer	2
Christopher Weber, Baker & Daniels	<b>Marion</b>	Ask A Lawyer	4
Thomas Wheeler, Locke Reynolds, LLP	<b>Marion</b>	Ask A Lawyer	2
Germaine Willett, Ice Miller	<b>Marion</b>	Ask A Lawyer	4



Anthony Zapata, Indiana Supreme Court	<b>Marion</b>	Ask A Lawyer	2
Mike Adler, Bingham McHale	<b>Marion</b>	Ask A Lawyer	2
Holly Ahrendt, Barnes & Thornburg	<b>Marion</b>	Ask A Lawyer	2
Lawrence Arany, Attorney at Law	<b>Marion</b>	Ask A Lawyer	2
Holly Ahrendt, Barnes & Thornburg	<b>Marion</b>	Ask A Lawyer	2
Lawrence Arany, Attorney at Law	<b>Marion</b>	Ask A Lawyer	2
Denise Barkdull, Ice Miller	<b>Marion</b>	Ask A Lawyer	2
Angela Berg, Barnes & Thornburg	<b>Marion</b>	Ask A Lawyer	2
Peyton Berg, Bose McKinney & Evans, LLP	<b>Marion</b>	Ask A Lawyer	2
Michael Borschel, Attorney at Law	<b>Marion</b>	Ask A Lawyer	2
Gregory Bowes, Bowes & Associates	<b>Marion</b>	Ask A Lawyer	2
Monica Brownell, Barnes & Thornburg	<b>Marion</b>	Ask A Lawyer	2
Jon Bumgarner, Hall Render Killian Heath & Lyman, P.S.C.	<b>Marion</b>	Ask A Lawyer	2
Sonia Chen, Stewart & Irwin, P.C.	<b>Marion</b>	Ask A Lawyer	2
Tami Earnhart, Ice Miller	<b>Marion</b>	Ask A Lawyer	2
Christopher Haigh, Barnes & Thornburg	<b>Marion</b>	Ask A Lawyer	2
Julie Halbig, Kreig DeVault, LLP	<b>Marion</b>	Ask A Lawyer	2
Mike Hartman, Bingham McHale	<b>Marion</b>	Ask A Lawyer	2
Bradley Hasler, Bingham McHale	<b>Marion</b>	Ask A Lawyer	2
Carl Hayes, McTurner & Turner	<b>Marion</b>	Ask A Lawyer	2
Linda Hightshue, Barnes & Thornburg	<b>Marion</b>	Ask A Lawyer	2
Robert Hurley, Attorney at Law	<b>Marion</b>	Ask A Lawyer	2
Douglas Kinser, Hall Render Killian Heath & Lyman, P.S.C.	<b>Marion</b>	Ask A Lawyer	2
Robert Kixmiller, Barnes & Thornburg	<b>Marion</b>	Ask A Lawyer	2
Gary Klotz, Bingham McHale	<b>Marion</b>	Ask A Lawyer	2
Kevin Knight, Ice Miller	<b>Marion</b>	Ask A Lawyer	2
Kate Kuehn, Lee Burns & Cossell, LLP	<b>Marion</b>	Ask A Lawyer	2
Roxanne Larrison, Barnes & Thornburg	<b>Marion</b>	Ask A Lawyer	2
Jane Laupus, Attorney at Law	<b>Marion</b>	Ask A Lawyer	2
John Maley, Barnes & Thornburg	<b>Marion</b>	Ask A Lawyer	2
Bradley Maurer, Bingham McHale	<b>Marion</b>	Ask A Lawyer	2
Marcelle Mayard-Henry, Ice Miller	<b>Marion</b>	Ask A Lawyer	2
Patricia McMath, Attorney at Law	<b>Marion</b>	Ask A Lawyer	2
Kori McOmber, Threlkeld Reynolds, LLP	<b>Marion</b>	Ask A Lawyer	2
Catherine Meeker, Baker & Daniels	<b>Marion</b>	Ask A Lawyer	2
Vicki Merriman, Dorn & Associates	<b>Marion</b>	Ask A Lawyer	2
Katherine Murray, Indiana State Department of Health	<b>Marion</b>	Ask A Lawyer	2
Lesley Nearpass, Kreig DeVault, LLP	<b>Marion</b>	Ask A Lawyer	2
Nelson Nettles, Norris Choplin Schroeder, LLP	<b>Marion</b>	Ask A Lawyer	2
Cheryl Northcutt, Barnes & Thornburg	<b>Marion</b>	Ask A Lawyer	2
Leonard Opperman, Kunz & Opperman, P.C.	<b>Marion</b>	Ask A Lawyer	2
Mike Padgett, Bingham McHale	<b>Marion</b>	Ask A Lawyer	2
Ayeshah Patterson, Ice Miller	<b>Marion</b>	Ask A Lawyer	2
Carl Pebworth, Baker & Daniels	<b>Marion</b>	Ask A Lawyer	2
Dorene Philpot, Attorney at Law	<b>Marion</b>	Ask A Lawyer	2
Allan Reid, Samper Atz Reid & Woodmansee	<b>Marion</b>	Ask A Lawyer	2
Brenda Rodeheffer, Monday Rodeheffer Jones & Albright	<b>Marion</b>	Ask A Lawyer	2
Jim Rossow, Rubin & Levin, P.C.	<b>Marion</b>	Ask A Lawyer	2

Kerry Ryan, Bose McKinney & Evans, LLP	<b>Marion</b>	Ask A Lawyer	2
Mark Sausser, Baker & Daniels	<b>Marion</b>	Ask A Lawyer	2
Kyle Schmutzler, Bingham McHale	<b>Marion</b>	Ask A Lawyer	2
Katherine Shelby, Bingham McHale	<b>Marion</b>	Ask A Lawyer	2
Donald Snemis, Ice Miller	<b>Marion</b>	Ask A Lawyer	2
Douglas Stephens, Pike Township Small Claims Court	<b>Marion</b>	Ask A Lawyer	2
Scott Stevens, Woodard Emhardt Moriarty McNett & Henry, LLP	<b>Marion</b>	Ask A Lawyer	2
David Stippler, Bingham McHale	<b>Marion</b>	Ask A Lawyer	2
Tony Sullivan, Barnes & Thornburg	<b>Marion</b>	Ask A Lawyer	2
Ali Tilghman, Kreig DeVault, LLP	<b>Marion</b>	Ask A Lawyer	2
Bruce Walker, Attorney at Law	<b>Marion</b>	Ask A Lawyer	2
Brian Welch, Bingham McHale	<b>Marion</b>	Ask A Lawyer	2
Katherine Winchester, Ice Miller	<b>Marion</b>	Ask A Lawyer	2
Chris York, Bingham McHale	<b>Marion</b>	Ask A Lawyer	2

Dave Adams, Bingham McHale, LLP	<b>Marion</b>	Legal Line	2
Nelson Alexander, Locke Reynolds, LLP	<b>Marion</b>	Legal Line	2
Bryan Babb, Bose McKinney & Evans, LLP	<b>Marion</b>	Legal Line	2
Jim Birge, Baker & Daniels	<b>Marion</b>	Legal Line	2
Richard Blaiklock, Lewis & Wagner	<b>Marion</b>	Legal Line	2
Jeffrey Boldt, Locke Reynolds, LLP	<b>Marion</b>	Legal Line	2
Ben Caughey, Ice Miller	<b>Marion</b>	Legal Line	2
Erin Clancy, Kightlinger & Gray, LLP	<b>Marion</b>	Legal Line	2
Amy Corsaro, Attorney at Law	<b>Marion</b>	Legal Line	2
Sonia Das, Lewis & Wagner	<b>Marion</b>	Legal Line	2
Robert Duff, Locke Reynolds, LLP	<b>Marion</b>	Legal Line	2
Anthony Eleftheri, Lewis & Wagner	<b>Marion</b>	Legal Line	2
Robert Foos, Lewis & Wagner	<b>Marion</b>	Legal Line	2
Wade Fulford, Locke Reynolds, LLP	<b>Marion</b>	Legal Line	2
Dee Ann Habegger, Ice Miller	<b>Marion</b>	Legal Line	2
Michael Hebenstreit, Whitham, Hebenstreit & Zubeck, LLP	<b>Marion</b>	Legal Line	2
Deb Hepler, Locke Reynolds, LLP	<b>Marion</b>	Legal Line	2
Gretchen Hess, Attorney at Law	<b>Marion</b>	Legal Line	2
Deborah Joachim, Marion County Public Defenders Office	<b>Marion</b>	Legal Line	2
John Kautzman, Ruckelshaus Roland Kautzman Blackwell & Hasbrook	<b>Marion</b>	Legal Line	2
Dan King, Locke Reynolds, LLP	<b>Marion</b>	Legal Line	2
Christine Klineman, Marion County Public Defenders Office	<b>Marion</b>	Legal Line	2
John Krause, Lewis & Wagner	<b>Marion</b>	Legal Line	2
Kyle Lansberry, Lewis & Wagner	<b>Marion</b>	Legal Line	2
Jeffrey Lund, Barnes & Thornburg	<b>Marion</b>	Legal Line	2
Melanie Margolin, Locke Reynolds, LLP	<b>Marion</b>	Legal Line	2
Michael McClain, Bose McKinney & Evans, LLP	<b>Marion</b>	Legal Line	2
Marc Moss, Baker & Daniels	<b>Marion</b>	Legal Line	2
Gracia Jean Meyer, Bingham McHale, LLP	<b>Marion</b>	Legal Line	2
Robyn Moberly, Marion County Superior Court	<b>Marion</b>	Legal Line	2
Mark Morrell, Ice Miller	<b>Marion</b>	Legal Line	2
Whitney Mosby, Bingham McHale, LLP	<b>Marion</b>	Legal Line	2
Anna Muehling, Bingham McHale, LLP	<b>Marion</b>	Legal Line	2
Sandra Perry, Bose McKinney & Evans, LLP	<b>Marion</b>	Legal Line	2

Dennis Otten, Ice Miller	<b>Marion</b>	Legal Line	2
Kenneth Reese, Lewis & Wagner	<b>Marion</b>	Legal Line	2
Beth Riga, Bose McKinney & Evans, LLP	<b>Marion</b>	Legal Line	2
Ian Stewart, Locke Reynolds, LLP	<b>Marion</b>	Legal Line	2
Christina Stolle, Bingham McHale, LLP	<b>Marion</b>	Legal Line	2
Whitney Wilson, Bingham McHale, LLP	<b>Marion</b>	Legal Line	2
Jeffrey Bennett, Bingham McHale, LLP	<b>Marion</b>	Property Tax Assessment	4
Marc Caito, Ernst & Young, LLP	<b>Marion</b>	Property Tax Assessment	4
G. John Cento, Katz & Korin, P.C.	<b>Marion</b>	Property Tax Assessment	4
Gretchen Gutman, Sommer Barnard Ackerson, P.C.	<b>Marion</b>	Property Tax Assessment	2
Ben Habegger, Riley Bennett & Egloff, LLP	<b>Marion</b>	Property Tax Assessment	2
Marc Hetzner, Krieg DeVault, LLP	<b>Marion</b>	Property Tax Assessment	4
Jeffrey Jinks, Kunz & Opperman, P.C.	<b>Marion</b>	Property Tax Assessment	2
F. Bradford Johnson, Sheeks Ittenbach Johnson Trettin Koeller	<b>Marion</b>	Property Tax Assessment	4
Kathryn Kunz, Kunz & Opperman, P.C.	<b>Marion</b>	Property Tax Assessment	2
Gordon Smith, Hume Smith Geddes Green & Simmons, LLP	<b>Marion</b>	Property Tax Assessment	2
Paula Zelman, Kunz & Opperman, P.C.	<b>Marion</b>	Property Tax Assessment	2
Ronald Dyer, Attorney at Law	<b>Marion</b>	National Health Care Decisions Week	2
Michael Fisher, Attorney at Law	<b>Marion</b>	National Health Care Decisions Week	2
Lawrence Lawhead, Barnes & Thornburg	<b>Marion</b>	National Health Care Decisions Week	2
Susan Simcox, Indiana State Department of Health	<b>Marion</b>	National Health Care Decisions Week	2
<b>TOTAL: 249 ATTORNEYS</b>			<b><u>TOTAL:</u></b> <b><u>622</u></b> <b><u>HOURS</u></b>

**OVERALL TOTALS: 352 Attorneys**

**OVERALL TOTAL HOURS: 1,100**

## 2003 Report

**Please list your District's 2003 activities--including committee meetings, training, attorney recognition, marketing and promotion--in chronological order.**

<u>Date</u>	<u>Activity</u>
1-6-03	Talk to a Lawyer Today ("TTALT") Committee Meeting
1-10-03	Talk to a Lawyer Video Replay Training Seminar
1-20-03	TTALT Toll Free Call-In Site and Julia Carson Center Walk-In Site
1-28-03	Marion County Family Court Project Committee meeting
3-7-03	Provided Lunch to Marion County Superior Court's Pro Bono Project training
3-14-03	Heartland's Board of Directors Annual meeting
3-29-03	Plan Administrator spoke at HUD not-for-profit training seminar
4-9-03	Attended Equal Justice Conference in Portland, Oregon
4-15-03	Plan Administrator spoke at training seminar for Operation Enduring Lamp at Stout Field
4-24-03	Judge Dreyer and Plan Administrator attended Morgan County Bar Association meeting to discuss implementation of intake and referral of pro bono program.
5-15-03	Heartland Budget Screening Committee meeting
5-19-03	Preventative legal education program at Wheeler Mission
5-20-03	Judge Dreyer and Plan Administrator Attended Boone County Bar Association officers' meeting to discuss implementation of an intake and referral pro bono program.
5-29-03	Heartland Board of Directors' Executive Committee meeting
June	Placement of 3 Notre Dame law students with providers for the summer

6-23-03	Audit
6-26-03	Heartland Board Of Directors meeting
6-30-03	Filming of new recruitment video segment at Ind. Court of Appeals with Judge Dreyer
7-16-03	Meeting with Hendricks County Bar Association to discuss implementation of a pro bono intake and referral program.
8-14-03	Meeting with Indianapolis Bar Association Pro Bono Committee to discuss Supreme Court Recruitment Day project.
8-26-03	Meeting with Damien Center staff to set up client referral process for pro bono legal services
9-10-03	Meeting with Indiana Coalition Against Domestic Violence to discuss client intake and referral procedures in District 8
9-16-03	Participated in Indiana Legal Services Pro Se Divorce Clinic
9-18-03	Plan Administrator was scheduled speaker at Predatory Lending Seminar
9-25-03	Heartland Board of Directors meeting
9-26-03	Shelby County Bar Association Training Seminar
10-8-03	Meeting with CLE Commission Executive Director regarding Rule Amendment process for possible Pro Bono CLE credit
10-24-03	Plan Administrators Retreat & Shepard Award Dinner
11-12-03	Provided lunch to Marion County Court Pro Bono Mediation Training
11-18-03	Heartland Board of Directors meeting
12-2-03	Heartland Awards Recognition Event at I.U. School of Law
12-6-03	Bankruptcy Seminar
12-8-03	TTALT Seminar
12-12-03	Family Law Seminar

## 2003 REPORT

**Please provide a short summary of how the provision of pro bono service is coordinated in your district, including the intake process, the relationships of pro bono providers in the district, how referrals are made, and how reporting is done.**

District 8 has nine separate county bar associations and six legal services providers. The seven county bar associations that surround Marion County have their own separate intake and referral programs. The Indianapolis Bar Association does not have a direct client intake program, and the Marion County Bar Association receives its indigent clients through an established program with Indiana Legal Services. Heartland has assisted four of these counties' bar association programs with ideas, guidance, forms, and financial support to implement its program. Heartland has assisted Shelby County with annual training and free CLE to assist in recruitment of new attorneys to its program and to thank those who have already participated. Each year Heartland requests that each program submit year-end statistics reflecting how many indigent clients have been served and the number of participating pro bono attorneys.

Each of the six legal services providers are in Marion County and each conducts its own intake, screening and referral. These providers use staff attorneys and pro bono volunteer attorneys. Through its continuing efforts to recruit new attorneys to pro bono, Heartland refers the names of new recruits to these providers, and they, in turn, place and monitor the pro bono case.

Heartland accepts cases for pro bono placement from these providers when they are unable to handle the representation due to conflicts of interest or staff and volunteer shortages. Often clients will contact Heartland directly after the other providers have rejected their cases, or call Heartland after having obtained a direct referral from the courts, local bar associations, private attorneys, friends, or through word on the street.

Social Services Agencies in the city of Indianapolis have developed a referral system with Heartland and directly refer potentially eligible clients by telephone. Healthy Families, the Family Advocacy Center, the Julian Center, the Damien Center, the Indiana Coalition Against Domestic Violence, the Marion Superior Courts, and law enforcement Victim Assistance are some of the agencies with which Heartland has developed a referral system.

Probably due to its location within the offices of Indiana Legal Services, Heartland receives more case referrals from Indiana Legal Services than from the other legal services providers. Many cases involving guardianship and estate matters from the Senior Law Project are directly referred to Heartland, and the ILS Managing Attorney directly refers non-family law cases that the staff is unable to handle. In turn, Heartland refers simple divorce clients to the ILS Pro Se Divorce Clinic, and has facilitated meetings between ILS and the Marion Superior Courts to try to improve and monitor the pro se filings.

Training seminars are coordinated among the providers, bar associations and Heartland with great success, which provides newly trained volunteers with an obligation to take pro bono cases. These joint ventures continue to be one of the best recruiting tools for all involved.

Each bar association and provider monitors its own case referrals and maintains its own internal statistical reporting. Heartland attempts to gather this information annually to include in its report to the Commission.

**Please describe any special circumstances, including difficulties encountered, affecting your District's 2003 implementation of its plan.**

In an effort to proceed with a possible new recruiting project, several of Heartland's Board of Directors met with the Indianapolis Bar Association's Pro Bono Committee staff to explore a partnership, tentatively entitled "Supreme Court Recruitment Day". This program would enlist attorneys and judges to telephone directly attorneys who have not yet volunteered to accept a pro bono case. Since the Indianapolis Bar Association is the largest group of attorneys and has an extensive database, Heartland felt this project could not succeed without the bar association's participation. The bar association did not want to participate in a general recruitment to pro bono and felt that any recruitment efforts should be to a particular program. As a result, Heartland may attempt to implement a smaller pilot project in one of the surrounding counties, utilizing one or two Supreme Court Justices with the local judiciary to assist local attorneys to contact and enlist the attorneys in the county who are not active in the local pro bono program.

All of the county bar associations have now implemented an intake and referral program. Heartland's continued offers of staff support, local free training programs, case referral and monitoring support have not been accepted. Only three of these seven bar associations have a designated staff person to handle intake, screening and referral. With the appointment of a new chair from outside Marion County, some of these barriers may be overcome.

Heartland's inability after 18 months of concentrated efforts to implement a centralized Intake through Information and Referral Network discouraged the Board of Directors from exploring other options, particularly after receiving limited funding for 2003. The new Chairman is going to explore with the Board other options to implement some form of centralized intake for Districts 8 at a fall strategic planning meeting.

**BUDGETS FOR 2003, 2004 AND 2005 *FOR IOLTA FUNDS ONLY***

<b>Cost Category</b>	<b>2003 actual expenditures</b>	<b>2003 Budget</b>	<b>2004 actual expenditures</b>	<b>2004 Budget</b>	<b>2005 Budget</b>
<b>A. Personnel Costs</b>					
1. Plan Administrator	45,000	45,000	45,000	45,000	45,000
2. Paralegals					
3. Others	360				
4. Employee benefits <b>FICA &amp; Unemployment</b>	3,685	3,685	3,685	3,685	3,685
a. Insurance					
b. Retirement plans					
c. Other	235				
<b>5. Total Personnel Costs</b>	49,280	48,685	48,685	48,685	48,685
<b>B. Non-Personnel Costs</b>					
1. Occupancy	16,193*	16,193*	5,040*	5,040*	5,040*
2. Equipment rental	*	*	*	*	*
3. Office supplies	252	500	92	*	*
4. Telephone	*	*	*	*	*
5. Travel	740	2,000	108	-0-	1,000
6. Training	3,446	5,000	69	3,000	1,000
7. Library					
8. Malpractice Insurance	2,988	3,000	2,988	3,000	3,000
9. Dues and fees	134	-0-	213	-0-	-0-



10. Audit	3,586	5,000		-0-	-0-
11. Contingent reserve					
12. Litigation reserve					
13. Marketing and promotion	896	5,000		-0-	4,000
14. Attorney recognition	6,112	6,000	100	6,500	1,500
15. Litigation Expenses (includes expert fees)	2,352	1,000	695	3,000	3,000
16. Property Acquisition					
17. Contract Services					
18. Grants to other pro bono providers	53,000	53,000	16,787	16,787	21,000
19. Other	272	-0-			
<b>20. Total Non-Personnel Costs</b>	86,971	93,000	25,492	37,327	39,540
<b>C. Total Expenditures</b>	136,251	141,693	74,177	86,012	88,225

**IOLTA funds received 2003: \$101,420 IOLTA funds received 2004: \$76,340**

**\*Occupancy** includes rent, furniture and equipment rental, office supplies, photocopying and telephone expenses.

### **Budget Narrative**

**Please provide descriptions of the following line items in the foregoing budget chart, by item number, in the space provided.**

**Lines (A)(1), (2), (3) Please indicate the number of hours per week for each personnel position and rate of pay.**

The only staff position at Heartland is the Plan Administrator who works 30 hours a week for \$45,000 annually with no benefits and no parking. This salary, FICA and Unemployment (\$3,442 and \$243) are processed through Indiana Legal Services at no charge.

**Line (B)(1) Please describe the occupancy cost in terms of square footage, utilities or other amenities and indicate whether the occupancy cost is above or below the market**

Heartland pays an annual fee for the use of a 120 square foot office with a window, including all utilities, furniture, use of a computer and printer, a separate telephone line, office supplies (excluding stationery), photocopying, and postage. The annual fee was calculated on actual 2002 costs. So the office space and furniture and equipment use are actually a donation to Heartland from Indiana legal Services. This rate is far below the actual costs to rent office space and below any other potential arrangements previously explored with other local organizations.

Below are the actual 2002 costs incurred by Indiana Legal Services for housing Heartland, which is the basis for the negotiated rate:

\$ 240 Photocopies  
\$ 500 Supplies  
\$2,500 Telephone and Long Distance  
\$1,800 Postage  
\$5,040 Total

